WV Online Case Management (CM) Pilot Project

Interim Service Plan Workflow Guide

Revised Feb. 27

E.2 Take Me Home (TMH), WV

When a TMH Participant enrolls in the ADW Program, a BoSS staff member opens the new Participant record and notifies the Supervisor, who assigns the workers. The Case Manager documents an Interim Service Plan, as well as initial and 7-day follow-up contacts. The standard Assessment and Service Plan are due within 21 calendar days.

E.2.a Add New Participant

1. Add Participant demographics

Go To: Demographics

(File menu - Add New People Search)

- 1. Search by name, then click Search button
- 2. If no match, click Add New button
- 3. Complete demographics fields as required
- 4. Add Mailing Address if different from Physical

(File menu - Save and Close)

2. Open new Participant in Assignments

Go To: Assignments

(When Demographics saved, system goes to page)

- 1. Update Status = Open
- 2. Search and select Worker = 'X, Unassigned'
- 3. Select 'Yes" in Take Me Home, WV

(File menu - Save and Close)

3. Open new Participant in Program and Agencies

Go To: Program, Agencies

(File menu - Add)

- 1. Complete required fields
- 2. Select Status = 'Open'
- 3. Status Date = today
- 4. Search and select Worker as 'X CM Unassigned'

(File menu - Save and Close)

Role: BoSS

Role: BoSS

Role: BoSS

4. Add Case Relations if known

Go To: Case Relations

(File menu - Add New Case Relations Search)

- 1. Click Search button, then Add New button
- 2. Complete fields as needed

(File menu - Save and Close)

5. Send Alert Note to Supervisors

Go To: Notes

(File – Add)

- 1. Enter Note details:
 - a. Date (default = today)
 - b. Note By (default = self)
 - c. Note Type = 'New Participant'
 - d. Note Sub-Type = 'Assign Worker'
 - e. Enter Subject and Note Details (optional)
 - f. Select Status = 'Alert'
 - g. Note Recipient = Supervisor

(File - Save and Close)

E.2.b Assign Worker

1. Review Alert Note

Go To: My Work Lists > Alert Notes

- 1. Open Note and 'Mark as Read' in Tools menu
- 2. Append comment
- 3. Update Status = 'Complete'

(File menu - Save and Close)

2. Assign Case Manager and Registered Nurse

Go To: Assignments

1. Select Worker

(File menu - Save and Close)

(CM changes in Program and Agency automatically)

Role: BoSS

Role: BoSS

Role: Supervisor

Role: Supervisor

3. Assign Registered Nurse in Agency

Go To: Agencies

Role: Supervisor

(Go to Workers and File menu - Assign Workers)

1. Select Worker

(File menu - Save)

- 2. Check box in list view on right
- 3. Tools menu Designate as Primary

(File menu – Close)

E.2.c Interim Service Plan

1. Add Note with attachment for "Take Me Home WV Transition Plan"

Go To: Notes

Role: CM

(File menu - Add)

- 1. Enter Note details:
 - a. Date (default = today)
 - b. Note By (default = self)
 - c. Note Type = 'Documentation Participant'
 - d. Note Sub-Type = 'Take Me Home WV Transition Plan'
 - e. Add Attachment
 - f. Note Recipient = Registered Nurse
 - g. Select Status = 'Complete'

(File - Save and Close)

2. Print signature page

Go To: Demographics (List View)

(Word Merge menu)

1. Select, download, and print

3. Tickler: Interim Service Plan

Go To: My Work Lists > Ticklers

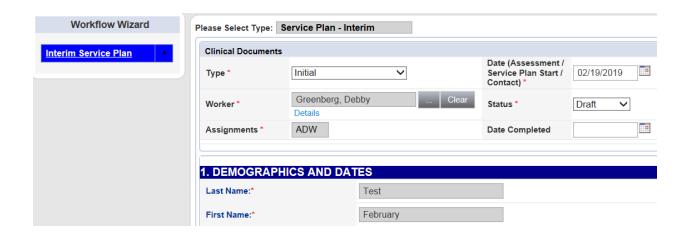
Role: CM

Role: CM

- 1. Enter header with Type = 'Initial'
- 2. Complete body of Clinical Document 'Service Plan Interim'
- 3. Update Status = 'Complete'

(File menu - Save and Close)

(Close Workflow Wizard)



Role: CM

Role: CM

Role: CM

Role: CM

4. Print and send Interim Service Plan to Participant

Go To: Clinical Documents

(Word Merge menu)

1. Select, download, and print

5. Add Note with document and signature page

Go To: Notes

a. Note Type = 'Case Note - CM'

b. Note Sub-Type = 'Interim Service Plan'

c. Add Attachment

d. Note Recipient = Registered Nurse

6. Add Case Relations

Go To: Case Relations

(File menu - Add New Case Relations Search)

1. Click Search button, then Add New button

2. Complete fields as needed

(File menu - Save and Close)

E.2.d <u>Initial Contacts, Assessments, and Service Plan</u>

1. Add Note for Initial Contact

Go To: Notes

a. Note Type = 'Case Note - CM'

b. Note Sub-Type = 'Initial Contact'

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2. Add Note for 7-Day Follow-up

Go To: Notes Role: CM

- a. Note Type = 'Case Note CM'
- b. Note Sub-Type = '7-Day Contact'

3. Tickler: PCA - Section 1 or 2 (TMH) - due within 21 days

Go To: My Work Lists > Ticklers Role: CM

- 1. Enter header with Type = 'Initial'
- 2. Complete body of Clinical Document
- 3. Update Status = 'Complete' (File menu – Save and Close) (Close Workflow Wizard)